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UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF WASHINGTON AT SPOKANE

MICHAEL J. HANSON, an individual,

Plaintiff,

v.

SUN LIFE FINANCIAL SERVICES
COMPANY, INC, a foreign
corporation; SUN LIFE ASSURANCE
COMPANY OF CANADA, a foreign
corporation,

Defendants.

NO. 2:22-cv-00306-MKD

PLAINTIFF'S RULE 26(a)(2)
DISCLOSURE OF EXPERT
WITNESS

Pursuant to Fed. R. Civ. P. 26(a)(2) and this Court's Second Jury Trial
Scheduling Order dated November 3, 2023, Plaintiff Michael J. Hanson makes the

PLAINTIFF'S RULE 26(a)(2) DISCLOSURE OF
EXPERT WITNESS - 1
No. 2:22-cv-00306-MKD

GORDON TILDEN THOMAS CORDELL	600 University Street Suite 2915 Seattle, WA 98101 206.467.6477
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1 following disclosure of a potential expert witnesses who may be used at trial to
2
3 present evidence under Federal Rules of Evidence 702, 703, or 705:
4

5 Peter Marchel, JD, MBA, CDR, RPLU, CPCU, ARM, AIS, AIM, AIC
6 Marchel & Associates Risk Consulting
7 12262 337th Place N.E.
8 Carnation, WA 98014
9 425.788.4349

10 Mr. Marchel is an expert in insurance claims handling and insurer bad faith
11
12 in Washington, and may testify regarding his opinions on Sun Life's claims
13
14 handling and bad faith with respect to Michael Hanson. Mr. Marchel was retained
15
16 following the Court's grant of Sun Life's Motion to Amend and Second Jury Trial
17
18 Scheduling Order. Dkts. 35, 38. Mr. Marchel is reviewing the documentation
19
20 obtained to-date. His opinions are not yet final as discovery is ongoing, Sun Life
21
22 has multiple outstanding document subpoenas, no depositions have taken place,
23
24 and Sun Life's recent Amendment to its Answer asserting new defenses. He will
25
26 provide his report with preliminary opinions on which he is prepared to testify in
27
28 the near term. A copy of Mr. Marchel's curriculum vitae is attached.
29

30 Mr. Marchel's rate for expert consulting services and depositions is s \$600 per
31
32 hour, \$300 per hour for travel, and \$700 per hour for trial or arbitration testimony.
33
34 He has testified in the last four years as shown in the attached list.
35

36 Mr. Marchel is generally available for deposition in the coming months.
37
38

1 DATED this 16th day of November, 2023.
2

3 **GORDON TILDEN THOMAS &**
4 **CORDELL LLP**

5 Attorneys for Plaintiff Michael J. Hanson
6

7 By s/ John D. Cadagan

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Curriculum Vitae of Peter Marchel, JD, MBA, CDR, RPLU, CPCU, ARM, AIS, AIM, AIC

Professional History

Marchel Risk Consulting LLC dba Marchel & Associates Risk Consulting 2012 –Current Founder & President.

Marchel & Associates Risk Consulting is a licensed surplus lines brokerage assisting insurance agencies, organizations and law firms in mitigating insurance risk. Clients range from single producer agencies to some of the largest brokerage firms in the world.

The surplus lines brokerage evaluates risk profiles and helps clients develop and place risk mitigation programs, including insurance, for companies in the areas of commercial liability – focusing on management, cyber breach and privacy, employment liability and professional liability. Industry focus: Financial Institutions, publicly traded companies and insurance companies and agencies.

Consulting for organizations and law firms on risk mitigation, including insurance policy review. We work with clients to resolve insurance disputes. We provide clients with guidance on preventing and defending management and professional liability claims.

Expert witness testimony and litigation support in insurance claims handling, insurance placement, insurer bad faith and agent and brokers errors and omissions. Peter Marchel has also served as an Arbitrator and Mediator.

Crump Insurance Services, Inc. 2009 – 2011

Senior Vice President, Claims Advocate. Responsible for developing financial services practice in the Pacific Northwest and Canada. Worked with local and regional insurance agencies in placing insurance coverage for their clients. Provided education and training for local and regional brokerages in management and professional liability coverage areas.

Provide clients with advice concerning mitigation and placement of insurance for management and professional liability exposures.

Alexander Morford & Woo, Inc, 2002 - 2009

Vice President and General Counsel.

Created management liability business for Canadian based risks, worked with national Canadian insurance agency in placing over 100 Public D&O accounts for Canadian based companies.

Created financial institution practice for management and professional liability risks focusing on public companies and financial institutions. Provided training to local and regional insurance agencies. Developed and presented several management liability programs for public and private company boards of directors.

Provide clients with guidance on preventing and defending management and professional liability claims. Assist clients with reservation of rights and denial of coverage letters from their insurer.

Marsh Inc, 1999 – 2002

Senior Vice President and Claims Advocate.

Consulted with Fortune 500 Companies on insurance coverage issues in management and professional liability. Work with clients to resolve high profile insurance disputes. Provide clients with guidance on preventing and defending management and professional liability claims.

Sedgwick Inc., 1997 – 1999

Associate General Counsel and Professional Liability Risk Management and Litigation Director.

Managed North American legal department defending professional and employment liability claims. Managed, hired and fired law firms across North America.

Responsible for reporting, reserving costs and expenses and resolving claims against Sedgwick in North America. Worked closely with Executive management in United States, Great Britain and fronting insurance company.

Developed and implemented training program, presented to employees across North America (5,000 employees). Reduced costs and expenses 35%.

Safeco Insurance Company 1991 – 1997

Attorney in Corporate (1996 - 1997)

Managed outside counsel on major litigation, RICO, Class Action and Bad Faith Lawsuits.

Safeco Insurance Company 1991 – 1997

Attorney in Trial Department (1991 – 1996)

Carried full trial case load, defended policyholders as trial attorney. Provide legal advice to internal business units and departments. Provide training to claims department on Alternative Dispute Resolution techniques. Developed early case evaluation program by implementing Total Quality Management and Alternative Dispute Resolution techniques within the various SAFECO office trial departments.

Craig L. Jones & Associates 1990 – 1991

Associate attorney.

Business formations and Real Estate transactions. Motions practice before county administrative and regulatory agencies and various Superior Courts.

Casey & Pruzan 1989 - 1990

Associate attorney.

Business and Real Estate transactions. Motions practice before Court of Appeals, Bankruptcy Court and various Superior Courts.

Washington State Supreme Court 1988 - 1989

Law Clerk to Chief Justice Callow.

Research and draft legal opinions. Prepare research and draft opinions on attorney disciplinary appeals.

Education

JD, Doctor of Jurisprudence,
Willamette University College of Law (1988)
(Law Review)

MBA, Master of Business Administration
Willamette University Atkinson Graduate School of Management (1988)

Certificate in Dispute Resolution,
Willamette University College of Law (1988)

BA Political Science and Communications
University of Washington (1984)

Certificate in Total Quality Management
University of Washington (1996)

CPCU – Chartered Property Casualty Underwriter.
Awarded by the American Institute for Chartered Property Casualty Underwriters.
(1996)

AIM – Associate in Management.
Awarded by the American Institute for Chartered Property Casualty Underwriters.
(1997)

AIS – Associate in Insurance Services.
Awarded by the American Institute for Chartered Property Casualty Underwriters.
(1997)

RPLU – Registered Professional Liability Underwriter.
Awarded by the Professional Liability underwriting Society. (2011)

ARM – Associate in Risk Management.
Awarded by The Institutes Risk & Insurance Knowledge Group. (2018)

AIC – Associate in Claims.
Awarded by The Institutes Risk & Insurance Knowledge Group. (2018)

Teaching

Adjunct Professor Crichton College, Memphis TN
Summer 2000 – Spring 2002

Classes:
Business Law Introduction to Business
Finance Investments
Insurance Law

Professional Affiliations and Licenses

Licensed Attorney in State of Washington
Licensed Surplus Lines Broker and Agent in State of Washington
Licensed in additional jurisdictions
American Association of Insurance Management Consultants (AAIMCo) (President from 2017 – 2019)
Washington Chapter Association of Corporate Counsel (President from 2006 – 2009)
PNW Chapter of Chartered Property Casualty Underwriters. (President Lake Washington Chapter 2006 – 2007, Board Member PNW Chapter – currently)
Washington State Bar Association
Washington Surplus Lines Association
Northwest Chapter of PLUS (2012 – 2018 Board member)
Washington Chapter RIMS (2016 – 2019 Past Board member)

	Expert Witness - Consulting Work					
Date	ACTION	Client	Court	Type of Matter	Scope of Work	Result
12/1/2012	Venture, Inc., v. Scottsdale Indemnity Company	Venture (P)	US Dist. Court SD, Jackson, MS USOC 3-12 CV-WH-LRA	Insurer Bad faith - EPL /EEOC Denial Interrelated Acts Notice	Deposition Report	Settled
2/1/2013	Millies v. Landamerica Transnation	Landamerica (D)	Superior Court Stevens County, WA No. 09-2-00426-7	Title Insurance company Bad faith claim regarding settlement offer	Trial Testimony	Defense verdict
8/1/2013	Lexington Insurance Company v. Horace Mann Insurance Company v. Aon Risk Services, Inc.	AON 3rd party D	US District Court Northern District Ills. Eastern Division 11-cv-02352	Agents & Brokers E&O Failure to advise, report a claim	Expert review and Report Deposition & Trial Testimony	Court ruled in favor of client
11/3/2014	Milgard Manufcaturg, Inc., v. Liberty Mutual Insurance Compnay	Milgard (P)	Western District of Washington Cause No. 13-cv-06024-BHS	Excess carrier, bad faith	Deposition Report	Settled
9/30/2015	Swerland v. All Pro Risk Management	Swerland (P)	King County Superior Court Cause No. 15-2-03116-3	Agents / Brokers Errors and Omissions	Review, Declaration, Deposition	Settled
12/14/2015	Alden Johnson v. Fire Insurance Exchange, Ryan Jackson and Jerry & Crystal Notson, Crystal Notson Insurance Agency, Inc.	Johnson (P)	Thurston county Superior Court Casue No. 14-2-02313-5	Agents / Brokers Errors and Omissions	Deposition	Settled
7/6/2016	New Hampshire Insurance Company, Vigilant Insurance Company, Certain Underwriters of Lloyds of London Subscribing to Certificate No. 0576MMU280, St, Paul Fire & Marine Insurance Company, Fidelity & Deposit Company of Maryland, Continental Casualty Company, Liberty Mutual Insurance Company, Great American Insurance Company and Axis Reinsurance Company v. MF Global	MF Global (D)	Supreme Court of the State of New York, County of New York Index No.: 601621/09	Fidelity Bond loss - Declaratory action filed by Insurers - bad faith action	Review , report, Deposition	

7/19/2016	John & Patricia Forrest v. Bridget Kemahli, Kemahli Financial Services and Framers Insurance Company of Washington	John & Patricia Forrest (P)	King County superior Court Cause No. 16-2-07752-8	Agents E&O and bad faith claims handling	Review, report, deposition	Settled
12/13/2017	Kimberly Corsentino v. Hub Interntational Services, Inc., and The Travelers Indemnity Compnay of Connecticut and Jason & Mendy Brockman, Plainitff Intervenors	Hub International Services, Inc., (D)	United States District Court for the District of Colorado	Agents E&O	Review, report and deposition	Settled
10/23/2018	Gregory J. Stark and Amanda A. Comeau vs. Markel American Insurance Company, And Degginer McIntosh & Associates, Inc	Gregory Stark (P)	King County Superior Court 17-2-23240-8 SEA	Agents E&O	Review, report, deposition	Settled
11/18/2021	Robert and Mimi Oshodine v. Farmers Group, Inc, et al	Farmers Group, Inc (D)	Superior Court of the State of California, County of Los Angeles - Central	Agents E&O, Insurance Bad Faith	Trial Testimony	Defense verdict
9/15/2022	James W. cherberg and NanChot Cherberg v. Fidelity National title Insurance Company	Fidelit National Title Insurance Company (D)	Superior court of the State of Washington County of King	Reservation of Rights, Claim handling	Deposition	On going